

Admin Officers,

Please use this checklist throughout the performance period – Original plans should be sent to HS50, Attn: Dana Blaine, no later than June 1, and after the final discussion is held with the employee.

#### PLANNING

- Employee and supervisor signatures and dates for planning discussion
- **Development Discussion initials (Good time to develop the IDP also)**
- Communicate performance indicators to employee, ask for their input/comments/ and let employee know how their performance supports agency/Center/organization goals and objectives
- **Identify critical/non-critical elements and explain to employee the significance of this distinction**
- **Mark all generic elements as applicable to strategic plan; additional job-specific elements should be applicable to the strategic plan**
- At least one element must be critical on employees' plan, all should be critical for supervisors' plan
- Ensure that you have additional requirements contained in Dave King's letter dated 9/13/2006
- Additional safety indicators can be added to the SHE element
- Include Technology Transfer element only if it is applicable to the position

#### PROGRESS REVIEW

- **Employee and supervisor initials and date for mid-term review**
- **Development Discussion initials and date (complete at this time if not accomplished during the planning discussion)**

#### SUMMARY RATING

- Ensure that each employee under elements and standards for at least 90 days has a rating.
- **Rate each element**
- Mark final rating
- **Employee and supervisor signatures for final rating. Second level supervisor signature is required for "Fails to Meet Expectations" or "Distinguished" ratings**
- **For the "Distinguished" Rating all elements must be rated "Significantly Exceeds" with documentation (if documentation is not provided for each element in the space provided, it must clearly be addressed as part of the final narrative summary)**
- **Employees cannot receive a "Distinguished" rating if a planning discussion has not been documented**

- If the rating is “Meets or Exceeds” and the supervisor wants to justify the “Exceeds” level in order to support an SSP Award, please provide supporting documentation on each applicable element and/or in the narrative summary
- If the final rating is “Fails to Meet Expectations” please provide documentation in the appropriate element(s). For this rating, the employee must “fail” in at least one critical element.
- Include written input from prior supervisor/detail or matrix supervisor (this information is considered when rating employee; attach any documentation to plan when you submit it to HS50)
- Include any written input from employee (attach to plan submitted to HS50 – NASA Form 1729 can be used by the employee for this purpose; additional sheets can be used to provide input for additional elements)
- **Distinguished ratings will be reviewed when received and returned for additional documentation/missing information, if necessary to support the rating – element rating justification for a “Significantly Exceeds” must meet the level of performance described in NPR 3430.B1 “Performance that consistently exceeds the performance standard and identified performance indicators to an exceptional degree for the element”**). Compare this to the “Meets or Exceeds Expectations” level which the NPR defines as “A broad range of performance that at least fully meets or may exceed the performance standard and identified performance indicators for the element.”

**Items in bold are common errors/omissions found on last year’s ratings**

**Performance evaluations with items in bold and underlined were returned to the organization for correction.**